



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

1A Paul Harvey Wallace (Estate)
Atty Donaldson, Larry A. (pro per – former Executor)
Atty Kruthers, Heather H. (for Public Administrator – successor Administrator)

Case No. 08CEPR00294

Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08. The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/1 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 10/23/14</u> As of 01/21/15, nothing further has been filed. 1. The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.
Cont. from 040714, 050514, 070714, 090814, 102314		
Aff.Sub.Wit.		
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Inventory		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: JF		
Reviewed on: 01/15/15		
Updates:		
Recommendation:		
File 1A – Wallace		

1A

1B Paul Harvey Wallace (Estate)

Case No. 08CEPR00294

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08. On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13. Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 10/23/14</u> As of 01/15/15, nothing further has been filed.
Cont. from 010214, 013014, 022014, 041714, 050514, 070714, 090814, 102314		
Aff.Sub.Wit.		
Verified		
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Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: JF
Reviewed on: 01/15/15
Updates:
Recommendation:
File 1B – Wallace

1B

1C Paul Harvey Wallace (Estate)

Case No. 08CEPR00294

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 10/23/14</u> As of 01/15/15 nothing further has been filed.
Cont. from 010214, 013014, 022014, 050514, 070714, 090814, 102314	On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	
Aff.Sub.Wit.		
Verified		
Inventory		
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Notice of Hrg		
Aff.Mail		
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Sp.Ntc.		
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Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
		Reviewed by: JF
		Reviewed on: 01/15/15
		Updates:
		Recommendation:
		File 1C – Wallace

1C

Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>Notice of Status Hearing filed 11/28/12 set this matter for status. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Larry A. Donaldson on 10/19/12.</p> <p>Declaration of Beneficiary Laura Leonard re Probate Status Hearing – Failure to File First Account or Petition for Final Distribution filed 01/13/11 states: she and her brother (both beneficiaries of the estate) have made many written and verbal requests to Mr. Donaldson requesting an accounting and for their father's estate be brought to a close. Ms. Leonard states that Mr. Donaldson has ignored their requests and repeatedly failed to communicate with them regarding the estate. Ms. Leonard and her brother had an attorney, Frederick Borges, contact Mr. Donaldson on their behalf to request that he move forward with the estate. Mr. Donaldson responded that he would move forward, but has failed to do so. Ms. Leonard states that she and her brother have also made a complaint to the state bar of California regarding Mr. Donaldson's failure to act. Ms. Leonard states that after all of these efforts, Mr. Donaldson recently provided them with a sloppy, incomplete "accounting", however several years' worth of information is absent and many of the transactions are questionable. Declarant further states that she and her brother were supposed to receive a distribution in early January, but have not received anything.</p> <p>Inventory & Appraisal, partial no. 1 filed 07/24/13 - \$1,619,273.76</p> <p>Clerk's Certificate of Mailing filed 10/08/13 states that a copy of the Minute Order from 10/04/13 was mailed to Larry Donaldson on 10/08/13.</p> <p style="text-align: center;">Continued on Page 2</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 10/23/14</u></p> <p>Note: Minute order from 07/26/13 states: Mr. Donaldson advises the Court that he filed a status statement yesterday. He further advises that the accounting is being done however he may have a conflict which may require another attorney to complete the work in this matter. The Court on its own motion accepts Mr. Donaldson's withdrawal as Executor in this matter and appoints the Public Administrator. Mr. Donaldson is directed to contact Ms. Kruthers.</p> <p>Note: Letters of Administration were issued to the Public Administrator on 08/01/13.</p> <p>As of 01/15/15, the following remains outstanding:</p> <ol style="list-style-type: none"> 1. Need Final Inventory & Appraisal. 2. Need Accounting and/or Petition for Final Distribution.
Cont. from 050514, 070714, 090814, 102314		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202 Order		
Aff. Posting Status Rpt		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: JF</p> <p>Reviewed on: 01/15/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1D – Wallace</p>		

Status Report Regarding Filing of Accounting filed 07/01/14 states: Mr. Donaldson has retained Curtis Rindlisbacher to assist him in the preparation of an accounting that will conform with the requirements of the Probate Code. Mr. Rindlisbacher has been in contact with the accountants who prepared prior accountings and he is working with them to segregate the accounting for the probate estate and the accounting from the trust estate. Mr. Rindlisbacher has spoken with attorney Heather Kruthers regarding the need for additional time to complete the accounting and she has consented to an extension of time to file the accounts with the court. It is believed that the work can be completed in 45 days and therefore requests that the status hearing be continued to on or after 08/21/14.

Status Report Regarding Filing of Accounting filed 10/22/14 states: Mr. Donaldson has retained Curtis Rindlisbacher to assist him in the preparation of an accounting that will conform with the requirements of the Probate Code. Mr. Rindlisbacher has been in contact with the accountants who prepared prior accountings and he is working with them to segregate the accounting for the probate estate and the accounting from the trust estate. This process has been delayed due to recent hospitalization of Mr. Rindlisbacher and more time is needed. A 45 day continuance is requested.

Fourth Account and Status Report of Executor and Petition for: (1) Approval of Fourth Account and Report; and (2) Authorization to Continue Estate Administration

DOD: 4-13-10		JOACHIM VOSS , Executor with Full IAEA and bond of \$300,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 3-1-13 through 10-31-14 Accounting: \$ 90,164.79 Beginning POH: \$ 89,760.51 Ending POH: \$ 82,516.06 (cash)	1. Petitioner did not use mandatory Judicial Council form Notice of Hearing DE-120, which contains mandatory notice language.
<input type="checkbox"/>	Aff.Sub.Wit.		<p>Note: If granted, the Court will set a status hearing for the filing of the next account or petition for final distribution as follows:</p> <ul style="list-style-type: none"> Wednesday, 11-30-16 <p>If the petition is on file pursuant to local rules, the status hearing may be taken off calendar.</p>
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	x	
<input checked="" type="checkbox"/>	Aff.Mail	w	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		<p>Petitioner prays for an order:</p> <ol style="list-style-type: none"> Petitioner's Fourth Account be settled, allowed and approved; Petitioner be authorized and directed to reimburse the sum of \$1,996.35 to his Oregon counsel for expenses advanced on behalf of the estate; All acts and proceedings of Petitioner as Executor as disclosed in this Fourth Account be confirmed, ratified, and approved; An extension of time be granted to complete administration following this estate and to allow collection of the Oregon ancillary probate until at least October 31, 2016, and if the estate does not appear ready to close by that time, Petitioner shall file an additional status report on or before November 30, 2016 describing and requesting any further extensions which may be necessary for administration of the estate; and For such other orders as this Court may deem proper.
<input checked="" type="checkbox"/>	Letters	11-24-10	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: skc

Reviewed on: 1-15-15

Updates:

Recommendation:

File 2 - Fujisaka

DOD: 10/3/1994	ROBERT L. JOHNSON was appointed Administrator without bond and with Limited IAEA authority on 7/31/12.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 100413, 121313, 032814, 072514, 111214	Letters issued 7/31/12.	
Aff.Sub.Wit.	I & A filed on 9/11/12 shows an estate valued at \$40,000.00	1. Need first account, petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Verified	Minute order dated 7/31/12 set status hearing on 10/4/13 for the filing of the First Account or Petition for Final Distribution. Minute order indicates Mr. Rindlisbacher was present.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Former Status Report filed on 7/23/14 states the estate is not yet in a condition to close. Fresno County has a lien on the property. In lieu of selling the property, Mr. Johnson is trying to seek the consents of the other beneficiaries for an assignment of their interest in exchange for a small payment that would take into consideration the amount of money Mr. Johnson has already expended to maintain the property since 1994. Attempts have been made to set up meetings, but the other heirs have been unwilling to attend. Mr. Johnson states he will need approximately four months to complete this work and provide a further status report to the court or petition for final distribution.	Examiner notes Sam Johnson Jr. survived the decedent (petition for probate indicates he died in 2004 or 2005) and declaration filed on 7/23/14 states Sam passed away after the decedent. Therefore, the estate of Sam Johnson Jr. is the other beneficiary of this estate and not his two children.
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 1/15/15
		Updates:
		Recommendation:
		File 3 - Johnson

1) First and Final Account and Report of Personal Representative; 2) Petition for Settlement; 3) for Waiver of Statutory Commission; 4) for Allowance of Attorneys' Fees for Ordinary and Extraordinary Services; 5) Reimbursement of Costs, and 6) for Final Distribution

DOD: 8-9-10		<p>SCOTT SCHARTON, Grandson and Executor with Full IAEA without bond, is Petitioner.</p> <p>Account period: 10-9-10 through 12-1-14 Accounting: \$135,000.00 Beginning POH: \$135,000.00 Ending POH: \$135,000.00 (Residential real property)</p> <p>Executor (Statutory): Waived</p> <p>Attorney (Statutory): \$5,050.00</p> <p>Attorney (Extraordinary): \$500.00 (for 3.1 attorney hours @ \$200/hr and 2.8 paralegal hours @ \$100/hr, total \$900.00, discounted by \$400.00, in connection with the petition to determine entitlement and agreement between heirs.</p> <p>Costs: \$1,921.50 (filing, publication, appraisal, certified orders, recording)</p> <p>Distribution pursuant to Decedent's will dated 9-19-07, Agreement Re Distribution of Estate dated 12-20-13, and Order Determining Entitlement to Estate Distribution filed 2-5-14:</p> <p>Sally Barrera: An undivided 33 1/3% interest in the real property</p> <p>Patricia Bye: An undivided 33 1/3% interest in the real property</p> <p>Katherine Gatlin: An undivided 33 1/3% interest in the real property</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need revised order in compliance with Local Rule 2.1.15:</p> <p>2.1.15 Signatures on Orders It is the policy of the court not to sign orders or judgments unless some portion of the text of the order or judgment appears on the page to which the judicial officer's signature is affixed, so that the connection between the signature page and the remainder of the order or judgment is apparent.</p>	
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
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	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			

Reviewed by: skc
Reviewed on: 1-15-15
Updates:
Recommendation:
File 4 - Uriarte

5 Evelyn I. Ford (Estate)

Case No. 14CEPR00536

Atty Keeler, William J.

Atty Cobb, Lee S.W.

Probate Status Hearing Re: Filing Inventory & Appraisal

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Final I&A filed 11-5-14.
DOD:		
Cont. from		
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<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
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<input type="checkbox"/>	Notice of Hrg	
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<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
Reviewed by: skc		
Reviewed on: 1-15-15		
Updates:		
Recommendation:		
File 5 - Ford		

Probate Status Hearing Re: Filing Inventory and Appraisal

		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u> Inventory and appraisal filed on 10/3/14.</p>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
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<input type="checkbox"/>	Notice of Hrg	
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<input type="checkbox"/>	Pers.Serv.	
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<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
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		Reviewed by: KT
		Reviewed on: 1/15/15
		Updates:
		Recommendation:
		File 6 - Li

Probate Status Hearing Re: Filing of Inventory & Appraisal

Age: 39 years	<p>BRIAN JACOB LANDE, spouse, was appointed as conservator of the person and estate, without bond, on 8/20/14.</p> <p>Letters issued on 8/25/14.</p> <p>Ex Parte Order granting independent powers to sell the conservatee's interest in real property was signed on 10/20/14.</p> <p>Inventory and Appraisal, part 1, with a value of \$213,500.00 was filed on 10/20/14.</p> <p>Amended Letters were filed on 10/21/14.</p> <p>Minute order dated 8/20/14 set this status hearing for the filing of the inventory and appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need <u>final</u> inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from		
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		<p>Reviewed by: KT</p> <p>Reviewed on: 1/15/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 - Carleton</p>

Probate Status Hearing Re: Filing Inventory and Appraisal

DOD: 5/31/14	<p>MELYNDA BOWMAN, daughter/sole heir was appointed Administrator without bond on 8/20/14.</p> <p>Letters issued 8/22/14.</p> <p>Minute order dated 8/20/14 set this status hearing for the filing of the inventory and appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
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Notice of Hrg		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: KT</p> <p>Reviewed on: 1/15/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 - Davis</p>	

Probate Status Hearing Re: Filing Inventory and Appraisal

DOD: 1/1/14	<p>CRAIG MACGLASHAN, son, was appointed Executor with Limited IAEA authority and without bond on 8/28/14.</p> <p>Letters issued on 8/28/14.</p> <p>Minute Order dated 8/28/14 set this status hearing for the filing of the Inventory and Appraisal.</p> <p>Status Report filed on 12/24/14 states he was the Conservator of the Estate of the Decedent. The final account in the conservatorship is set to be heard on 1/12/15. Once final accounting is approved, Petitioner will file and inventory and appraisal with the Court.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
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Notice of Hrg		
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Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: KT</p> <p>Reviewed on: 1/15/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 - McGlashan</p>		

**10 Richard Alan Maldonado aka Richard Maldonado aka R.A. Maldonado
aka Richard A. Maldonado aka Rich Maldonado (Estate)**

Case No. 14CEPR01101

Atty Teixeira, J. Stanley (for Jane E. Martinez – sister/Petitioner)

**Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)**

DOD: 10/22/14		JANE E. MARTINEZ , sister/named Executor without bond, is Petitioner. Full IAEA – OK Will dated 09/30/14 Residence: Fresno Publication: The Business Journal <u>Estimated Value of the Estate:</u> Personal property - \$ 30,000.00 Real property - 200,000.00 Total - \$230,000.00 Probate Referee: RICK SMITH	NEEDS/PROBLEMS/COMMENTS: 1. The Petition states that the decedent was not survived by a spouse or issue. Therefore item 6 (regarding survivors of the decedent) of the petition should be completed but was left blank. Need supplement to Petition indicating the correct selection under item 6. <u>Note: If the petition is granted status hearings will be set as follows:</u> • Wednesday 06/24/15 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday 04/20/16 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			s/p
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/o
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
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			Reviewed by: JF Reviewed on: 01/15/15 Updates: Recommendation: File 10 - Maldonado	

Age: 17		GENERAL HEARING: 02/26/15		NEEDS/PROBLEMS/COMMENTS:	
		JOSE ENCARNACION ORELLANA GUEVARA , non-relative (godfather), is Petitioner.		1. Need Notice of Hearing.	
		Father: UNKNOWN		2. Need proof of service of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> or Consent & Waiver of Notice or Declaration of Due Diligence for:	
Cont. from		Mother: MARIA ORELLANA – Consent & Waiver of Notice filed 12/22/14		a. Father (unknown)	
	Aff.Sub.Wit.	Paternal grandparents: UNKNOWN		b. Oscar Orellana Guevara (minor)	
✓	Verified	Maternal grandfather: LUCIO ORELLANA		Note: In addition to the temporary guardianship order, Petitioner has also submitted the <u>Order Regarding Special Immigrant Juvenile Status – Probate Guardianship</u> (Judicial Council Form GC-224) for this hearing but this temporary petition does not specifically request that the Court make this order at this time.	
	Inventory	Maternal grandmother: FELIPE GUEVARA			
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	w/			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 01/15/15	
				Updates:	
				Recommendation:	
				File 11 - Guevara	

Petition for Appointment of Temporary guardianship of the Person

Age: 16		<u>GENERAL HEARING: 02/26/15</u>		NEEDS/PROBLEMS/COMMENTS:	
		JOSE SANTOS QUINTEROS , non-relative (family friend), is Petitioner.		3. Need Notice of Hearing.	
		Father: JUAN JOSE BARRERA AGUILAR – Consent & Waiver of Notice filed 12/22/14		4. Need proof of service of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:	
Cont. from		Mother: RUBENIA ELIZABETH CALLEJAS – Consent & Waiver of Notice filed 12/22/14		c. Oscar Orellana Guevara (minor)	
	Aff.Sub.Wit.				
✓	Verified	Paternal grandfather: EUGOLIO BARRERA SANTOS			
	Inventory	Paternal grandmother: ALBERTINA AGUILAR			
	PTC	Maternal grandfather: JOSE ABRAHAM CALLEJAS			
	Not.Cred.	Maternal grandmother: MANUELA REYES			
✓	Notice of Hrg	Siblings: LANDER BARRERA CALLEJAS, JUAN JOSE BARRERA CALLEJAS, EVELIO BARRERA CALLEJAS, ANGIE MAYELO BARRERA CALLEJAS, ANGEL BARRERA CALLEJAS			
✓	Aff.Mail	w/			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
Failure to File a First Account or Petition for Final Distribution

		ARTHUR K. O'BRIEN , son, was appointed executor with full IAEA authority without bond on 07/14/2006.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.										
		PUBLIC GUARDIAN was appointed as Successor Administrator with full IAEA authority without bond on 06/23/2014.											
Cont. from 022814, 050914, 062314, 102314		Letters issued on 08/06/2014.	<table border="1"> <tr><td colspan="2">Reviewed by: LV</td></tr> <tr><td colspan="2">Reviewed on: 01/15/2015</td></tr> <tr><td colspan="2">Updates:</td></tr> <tr><td colspan="2">Recommendation:</td></tr> <tr><td colspan="2">File 13 – O'Brien</td></tr> </table>	Reviewed by: LV		Reviewed on: 01/15/2015		Updates:		Recommendation:		File 13 – O'Brien	
Reviewed by: LV													
Reviewed on: 01/15/2015													
Updates:													
Recommendation:													
File 13 – O'Brien													
Aff.Sub.Wit.		Final Inventory and Appraisal was filed 09/19/2014 showing an estate valued at \$87,500.00.											
Verified		Supplemental Inventory and Appraisal was filed 01/13/2015 showing an estate valued at \$3,055.50.											
Inventory													
PTC		<p>Former Status Report Regarding Failure to File Final Account filed by the Public Administrator on 10/16/2014 states the sole asset of the estate is 50% interest in the real property located in Fresno County. As part of the divorce settlement between Liane O'Brien and the decedent, they became tenants in common of the property. Liane O'Brien died May 4, 2006. Arthur K. O'Brien, Jr. petitioned and was appointed administrator of her estate on 10/24/2006 (Case #06CEPR00774). However, he never paid the bond, Letters were never issued, and nothing further was done in the estate. The Public Guardian had Arthur O'Brien's 50% interest in the real property appraised by Steven Diebert and has found a potential buyer for the property. However, the property needs to be sold in conjunction with the Liane O'Brien estate. Therefore, the Public Administrator requested that a status hearing be set for Liane O'Brien's estate, and it was set for 10/15/2014. At that hearing Arthur K. O'Brien, Jr. resigned as administrator. The Public Guardian needs to get the 50% interest of the real property owned the Liane O'Brien estate appraised by Rick Smith. In order to allow time to file the appraisal, complete the sale of the property, and to prepare the documents for the final account, it is respectfully requested that the next status hearing for this matter be set no sooner than 90 days from the date of this hearing.</p>											
Not.Cred.													
Notice of Hrg													
Aff.Mail													
Aff.Pub.													
Sp.Ntc.													
Pers.Serv.													
Conf. Screen													
Letters													
Duties/Supp													
Objections													
Video Receipt													
CI Report													
9202													
Order													
Aff. Posting													
Status Rpt													
UCCJEA													
Citation													
FTB Notice													

Atty Rindlisbacher, Curtis D., of Perkins, Mann & Everett (for Kenneth Wall, Administrator)

Status Hearing

DOD: 12/8/1988	<p>KENNETH WALL, son, was appointed Administrator with full IAEA authority without bond on 7/8/2008; Letters issued on 7/8/2008.</p> <p>Background:</p> <ul style="list-style-type: none"> First and Final Report of Administrator and Petition for Settlement of Account, for Allowance of Compensation to Administrator and Attorneys for Ordinary Services; and for Final Distribution and Reimbursement of Costs filed 10/30/2014 sought to distribute a share of the Estate of Camille Dolores Smith to Administrator of the Estate of Kelli Michelle Godinez (Decedent's daughter), Case 07CEPR01353; Bond was not posted and Letters of Administration never issued to an Administrator of the Estate of Kelli Michelle Godinez; Therefore, the Estate of Kelli Michelle Godinez is not in a position to receive assets from the Estate of Camille Dolores Smith, which of necessity delays completion of final distribution of the Estate of Camille Dolores Smith. <p>Minute Order dated 12/17/2014 from the hearing on the first and final account in the Estate of Camille Dolores Smith set this Status Hearing on 1/21/2015 for the failure to proceed with administration in the Estate of Kelli Michelle Godinez, Case 07CEPR01353, ordering as follows:</p> <ul style="list-style-type: none"> The Court orders that [amount omitted] be held by the Petitioner on behalf of the estate until an administrator is qualified to receive the funds in case 07CEPR01353. <p>Clerk's Certificate of Mailing filed 12/11/2014 shows a copy of the Notice of Status Hearing was mailed to Sheldon Feigel and Maximilano Godinez, Jr., on 12/11/2014.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Page 22 is a Status Hearing for the related Estate of Kelli Michelle Godinez, Case 07CEPR01353.</p> <p>1. Need verified Status Report and proof of service of the Status Report pursuant to Local Rule 7.5(B).</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: LEG</p> <p>Reviewed on: 1/15/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Smith</p>

DOD: 11/26/12	BETTY PHILLIPS and ROSE LEE LITTLE,	NEEDS/PROBLEMS/COMMENTS:
	sisters, were appointed Co-Executors	
	with full IAEA and without bond on	
	06/11/13. Letters Testamentary were	
	issued on 06/11/13.	
Cont. from 080814, 102314	Inventory & Appraisal, partial no. 1, filed	<u>CONTINUED FROM 10/23/14</u>
Aff.Sub.Wit.	02/13/14 - \$615,000.00	1. Need Account/Report on Waiver
Verified		of Account and Petition for Final
Inventory	Inventory & Appraisal, final, filed	Distribution <u>and/or</u> current written
PTC	07/17/14 - \$63,096.95	status report.
Not.Cred.	Status Report filed 10/17/14 states: Since	
Notice of Hrg	the last status report, a petition for	
Aff.Mail	preliminary distribution was granted	
Aff.Pub.	order the sums of \$70,000.00 each to	
Sp.Ntc.	Betty Phillips and Rose Lee Little and the	
Pers.Serv.	transfer of real property located at 945	
Conf. Screen	S. Clovis Ave., Unit J, Fresno to Kimberly	
Letters	Dee McLay. A civil action for breach of	
Duties/Supp	contract (14CECG02269) was served on	
Objections	Karlie Steinhauer, a beneficiary of the	
Video Receipt	estate, and Jamie Rust, for collection of	
CI Report	over \$50,000.00 due and owing to the	
9202	estate. Karlie Steinhauer has made	
Order	contact with the attorney and	
Aff. Posting	indicated that she is willing to	
Status Rpt	commence payments on the	
UCCJEA	contractual sum. It is believed that an	Reviewed by: JF
Citation	agreement can be made with Karlie	Reviewed on: 01/15/15
FTB Notice	Steinhauer to settle the debts without a	Updates:
	trial. Accordingly, a continuance is	Recommendation:
	requested.	File 15 – Kiramidjian

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Vermilyea age: 10		<p align="center">TEMPORARY EXPIRES 1/21/15</p> <p>ELAINE ROEBUCK ESTRADA, maternal grandmother, is petitioner.</p> <p>Father: MICHAEL JOHNESE – served by mail on 12/5/14.</p> <p>Mother: TINA JOHNESE – personally served on 11/25/14.</p> <p>Paternal grandfather: not listed Paternal grandmother: Angela Maternal grandfather: James Roebuck – served by mail on 11/25/14 without copy of the petition.</p> <p>Petitioner states both parents are on drugs and are not providing a safe, stable or clean environment for the children.</p> <p>Court Investigator Report filed on 1/5/15</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: Petitioner was previously appointed guardian of these minors' sibling Louise Roebuck (age 13) in 2005.</p> <p>Minute Order dated 12/4/14 from the hearing on the temporary petition states mother and father state their objections for the record. Any written objections should be filed and properly served by 1/5/15. The Court orders that Elaine Roebuck Estrada's husband not drink around the children.</p> <p>1. Petition lists the father of Thomas as Michael Johnese however the Court Investigator's Report indicated Thomas' father is Thomas Wallace.</p> <p>Please see additional page</p>
Thomas age: 7			
Angela age: 3			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 1/15/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 – Roebuck, Johnese & Wallace</p>	

NEEDS/PROBLEMS/COMMENTS (cont.):

2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition, or consent and waiver of notice or declaration of due diligence on:
 - a. Michael Johnese (father of Vermilya and Angela)
 - b. Thomas Wallace (father of Thomas Wallace)
3. Need proof of service of the Notice of Hearing along with a copy of the Petition or consent and waiver of notice or declaration of due diligence on:
 - a. Paternal grandfather of Vermilyea and Angela
 - b. Angela (last name not listed) Paternal grandmother of Vermilyea and Angela
 - c. Paternal grandparents of Thomas
4. Proof of service of the Notice of Hearing on the maternal grandfather, James Roebuck was not served with a copy of the petition as required.

**17 Fernando Zapata, Jayare Zapata, Noah Zapata & Marcell Zapata
(GUARD/P) Case No. 05CEPR00945**

Atty Zapata, Marie (pro per Guardian/paternal aunt)
Atty Zapata, Wendy (pro per Guardian/paternal aunt)
Atty Basquez, Emilia (pro per Petitioner/mother)

Petition for Termination of Guardianship

Fernando age: 18	EMILIA BOSQUEZ , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Fernando is now age 18 therefore his guardianship has terminated by operation of law. 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: a. Maria Zapata (guardian) b. Wendy Zapata (guardian) c. Jayare Zapata (minor) d. Noah Zapata (minor) e. Fernando Zapata, Jr. (father) – unless the court dispenses with notice.
Jayare age: 15		
Noah age: 13	MARIA ZAPATA and WENDY ZAPATA , paternal aunts, were appointed co-guardians on 2/16/2006.	
Marcell age: 11		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Father: FERNANDO ZAPATA, JR.	
<input checked="" type="checkbox"/> Verified	Paternal grandparents: Deceased Maternal grandparents: Deceased.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Petitioner states she feels she has come a long way to be a better mother to her boys. Petitioner states she can take better care of her children and provide them with that she can. Petitioner states she makes sure they are in school and have food, clothing and a home.	
<input type="checkbox"/> Notice of Hrg	X	
<input type="checkbox"/> Aff.Mail	X	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Court Investigator Report filed on 1/9/15	
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 1/15/15
		Updates:
		Recommendation:
		File 17 – Zapata

Petition for Visitation

Age: 1		RACHEL FERNANDEZ , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: Rachel Fernandez, Mother, filed a Petition for Termination of Guardianship on 12/03/2014. The hearing is set for 02/03/2015. 1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Michael Villareal (Father) • Paternal Grandmother (Not Listed) • Maternal Grandfather (Not Listed)
Cont. from		ANNETTE FERNANDEZ , maternal grandmother, was appointed guardian on 01/23/2014. Annette Fernandez was personally served on 12/18/2014.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	n/a	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV Reviewed on: 01/15/2015 Updates: Recommendation: File 18 – Fernandez

Amended Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 7-26-14	SANTIAGO LOPEZ, JR., is Petitioner. (Relationship not stated)	NEEDS/PROBLEMS/COMMENTS: 1. Summary proceedings such as this Petition to Determine Succession to Real Property under Probate Code §13150 can only be used to pass property to the proper successors in interest, who must all petition together. Here, the successors in interest would be all of the decedent's 11 children listed at Attachment 14, and possibly the estate of the decedent's deceased spouse, depending on the date of death. Therefore, it does not appear that the property can pass to Petitioner only using this type of procedure with this petition. If this petition goes forward, the following items will need to be addressed: 2. Need Inventory and Appraisal pursuant to Probate Code §13152(b). 3. Need date of death of decedent's spouse pursuant to Local Rule 7.1.1.D. 4. Need Notice of Hearing Form DE-120. 5. Need proof of service of Notice of Hearing for this (2 nd) amended petition at least 15 days prior to the hearing on all relatives pursuant to Probate Code §§ 13153, 1220. 6. Need order.
	40 days since DOD	
	No other proceedings	
Cont. from	I&A: Need	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate	
<input checked="" type="checkbox"/> Verified	Petitioner requests Court determination that Decedent's 100% interest in the real property located at 7220 W. Springfield in Raisin City, CA, passes to him 100%.	
<input type="checkbox"/> Inventory	Petitioner lists 11 children of the decedent at Attachment 14, including Petitioner.	
<input type="checkbox"/> PTC	Petitioner states he is seeking succession to the property to secure financing to keep the property. Without this funding, the loan on said property is now due and payable. Petitioner is best suited to secure said funding as he is qualified to assume present mortgage. In addition, Petitioner has lived in this residence for five years as the decedent's son and care provider. All siblings have been notified by US mail as to court hearings and in person.	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Reviewed by: skc

Reviewed on: 1-15-15

Updates:

Recommendation:

File 19 - Lopez

		TEMP EXPIRES 1-21-15	NEEDS/PROBLEMS/COMMENTS:
		NELLIE RODRIGUEZ TELLO , Maternal Aunt, is Petitioner.	<p>Minute Order 12-2-14 (Temp): Maxine Rodriguez represents that the father of the minor is Gilbert Roland Chavez, but she does not know his whereabouts; petitioner is to continue to attempt to locate him. The Court dispenses with notice as to the paternal grandparents. The Court orders Maxine Rodriguez to report to Global Testing forthwith and submit to a drug test. Ms. Tello is to accompany her and pay for the test. Furthermore, Ms. Tello is to pick up the child forthwith and may contact the police department to accompany her if necessary. Cont. to 012115. Granted; signed.</p> <p>Note: Petitioner filed an additional declaration on 12-3-14.</p> <p>Note: On 12-16-14, a Probate Mediation Agreement was filed that addresses visitation and drug testing. The agreement indicates that a follow-up mediation is set for 1-14-14 to continue consultations prior to the next hearing.</p> <p>1. Petitioner filed a second Declaration of Due Diligence re the father. If diligence is not found, need notice per §1511 or further diligence per Minute Order 12-2-14.</p>
		Father: GILBERT ROLAND CHAVEZ - Declaration of Due Diligence filed 11-25-14	
		Mother: MAXINE F. RODRIGUEZ - Personally served 11-23-14 - Present at hearing 12-2-14	
		Paternal Grandfather: Not listed - Declaration of Due Diligence filed 11-25-14, notice dispensed 12-2-14	
		Paternal Grandmother: Not listed - Declaration of Due Diligence filed 11-25-14, notice dispensed 12-2-14	
		Maternal Grandfather: Deceased	
		Maternal Grandmother: Guadalupe S. Rodriguez - Personally served 11-23-14 - Present at hearing 12-2-14	
		Petitioner states [See petition for details.]	
		The Court Investigator filed a report on 1-15-15.	
<input type="checkbox"/>	Aff.Sub.Wit.		
✓	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
✓	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	X	
<input type="checkbox"/>	Clearances	X	
✓	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
✓	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: skc Reviewed on: 1-14-15 Updates: 1-15-15 Recommendation: File 20A - Rodriguez

Atty Staunton, Cynthia Ann (Pro Per – Beneficiary – Petitioner)
 Atty Buettner, Michael M. (for Joseph J. Marzullo – Trustee – Respondent)

Petition to Compel Account

Marguerite N. Marzullo DOD: 4-11-98		CYNTHIA ANN STAUNTON , Beneficiary, is Petitioner. Petitioner states she is a beneficiary of the Marzullo Revocable Living Trust dated 5-19-97 created by Joseph J. Marzullo, Jr., and Marguerite N. Marzullo, as settlors and trustees, as amended by the first and second amendments, both dated 5-19-97. Attached may not be a complete copy, only what she was given. Petitioner states she has made countless attempts to request a full and complete accounting, but the Trustee never provided Petitioner with any information regarding the trust estate. Petitioner is entitled to an account pursuant to §16062(a). Petitioner and her son are beneficiaries to whom as stated previous cannot at this time state under these codes what they are entitled to, however as the court to help us in this process. The trustee became the trustee as a result of the death of the surviving settlor <i>[sic]</i> Marguerite N. Marzullo on 4-11-98. Soon, she will have gone through 17 years of this and with his knowledge of Petitioner's finances and having no means to seek even the smallest amount of legal representation, advice, etc., and all these years with nothing. Petitioner prays for an order: 1. Finding that notice of hearing has been given as required by law; 2. Compelling the trustee to deliver an account of the transactions of the trust to Petitioner by as soon as Court orders; and 3. For such other and further orders as the Court deems just and proper. See Page 2.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing (DE-120). 2. Need proof of service of Notice of Hearing at least 30 days prior to the hearing pursuant to Probate Code §17203 on the trustee and all beneficiaries: - Joseph John Marzullo, Jr. (Trustee) - Joseph J. Marzullo, III (beneficiary and named successor trustee) - Dillon Quiroz (beneficiary) - Darrell Jordan (named alternate successor trustee) - Any other person entitled to notice pursuant to §17203. <u>Note:</u> Petitioner filed a Declaration of Due Diligence for Trustee Joseph John Marzullo, Jr. <u>Note:</u> Petitioner listed only the trustee and beneficiaries in the petition; however, the trust provides the name of the alternate successor trustee, who is entitled to notice. The Court may require a complete list compiled and verified by Petitioner of all entitled to notice of these proceedings. 3. The trust at Article VII, Section 7.6, states: During the time that either Settlor serves as Trustee hereunder no account shall be required of said Settlor serving as Trustee, such accounting being specifically waived in such instance by the Settlers. The Court may require clarification or authority regarding Petitioner's request for an accounting. (Do the amendments referenced provide further direction?) 4. This petition was filed with a fee waiver. If Petitioner receives distribution, filing fees may be due.																																																																													
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Page 2

Response filed 1-16-15 by Joseph J. Marzullo, Trustee, states he is not required to account for the period when the trust may be revoked. One of the subtrusts is the survivor's trust, and accordingly, no accounting need be made to Petitioner with respect to the survivor's Trust. Mr. Marzullo states he is the current beneficiary and sole trustee; therefore, no account is required. Also, Petitioner has failed to comply with notice provisions of § 17203. He and Petitioner have had an estranged relationship for many years. Petitioner has been verbally abusive to Respondent and has made threats against him. In spite of this, Respondent has provided considerable financial assistance to Petitioner over the years.

Respondent prays that:

1. The Court deny the relief requested in the petition;
2. That Petitioner take nothing by way of her petition;
3. Such other and additional relief as the court deems appropriate.

Atty Feigel, Sheldon W. (prohibited from practicing law in California effective 1/8/2015)
 Pro Per Godinez, Jr., Maximilano (Pro Per Successor Administrator)

Probate Status Hearing for Failure to File Bond and have Letters Issue, Failure to File an Inventory and Appraisal and Failure to File a First Account or Petition for Final Distribution

DOD: 8/27/2007	MAXIMILLANO GODINEZ, JR. , step-son, was appointed Successor Administrator with full IAEA authority with bond of \$250,000.00 on 10/23/2008.	NEEDS/PROBLEMS/COMMENTS: Page 14 is a Status Hearing for the related <i>Estate of Camille Dolores Smith</i> , Case 08CEPR00560. 1. Need proof of \$250,000.00 bond to be filed with the Court. 2. Need <i>Final Inventory and Appraisal</i> pursuant to Probate Code § 8800(b), 3. Need first account and/or petition for final distribution
Cont. from	Bond was not posted and Letters of Administration never issued.	
Aff.Sub.Wit.		
Verified		
Inventory	X	
Bond	X	
Not.Cred.		
Notice of Hrg	Notice of Status Hearing filed 12/11/2014 set this Status Hearing on 1/21/2015 for failure to file bond, failure of issuance of Letters, failure to file an inventory and appraisal, and failure to file a first account and/or petition for final distribution.	
Aff.Mail		
Aff.Pub.	Clerk's Certificate of Mailing filed 12/11/2014 shows a copy of the <i>Notice of Status Hearing</i> was mailed to Sheldon Feigel and Maximilano Godinez, Jr., on 12/11/2014. A courtesy copy of the <i>Notice of Status Hearing</i> was mailed to Attorney Curtis Rindlisbacher on 12/11/2014.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 1/15/15
		Updates:
		Recommendation:
		File 22 – Godinez

Atty Kruthers, Heather H. (for Petitioner Public Guardian)

Petition for Appointment of Temporary Conservator of the Estate

			TEMPORARY EXPIRES 1/21/2015		NEEDS/PROBLEMS/COMMENTS:
			<u>GENERAL HEARING SET FOR 2/11/2015</u>		1. Pursuant to Probate Code 2250.2(c), need proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> and a copy of the Petition for <i>Appointment of Temporary Conservator</i> for:
Cont. from			PUBLIC GUARDIAN is Petitioner and requests appointment as Conservator of the Estate without bond.		
	Aff.Sub.Wit.		Petitioner states asserts the only means to recover misappropriated property and protect funds is conservatorship of the estate.		• Mildred Cross, proposed Conservatee.
✓	Verified				
	Inventory		Court Investigator's Report was filed on 1/5/2015.		2. Need proposed order and letters of temporary conservatorship (those previously submitted were used to grant the petition ex parte.)
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	W/			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	X			
	Conf. Screen				
	Letters	X			
	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
	Order	X			
	Aff. Posting				Reviewed by: LEG
	Status Rpt				Reviewed on: 1/16/14
	UCCJEA				Updates:
	Citation				Recommendation:
	FTB Notice				File 23 - Cross

Petition for Visitation

Age: 6 years		<p>RACHEL SHEA, mother, is Petitioner.</p> <p>SHARON KUGELMAN and RONALD KUGELMAN, maternal grandparents, were appointed as Co-Guardians of the Person on 02/28/12.</p> <p>Father: JOSHUA GOMEZ</p> <p>Petitioner states at the last hearing it was suggested to have visits with Jenna to re-establish a bond. Mom states she has since moved back to California to make it easier to set up weekly, consistent visits. Mom states she loves Jenna and wants her to know that the changes she made were to be a better mom to her. Mom states she is not trying to be in and out of her life and she has made many changes in her life to be a better parent for her.</p> <p>Objections to Visitation filed by Guardians Ronald Kugelman and Sharon Kugelman on 11/14/14.</p> <p>Court Investigator Report filed 1/12/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 1/14/15. Minute order states The guardians did not obtain a counselor for the minor as previously ordered due to misunderstanding the Court's orders. However, they represent that they contacted Kaiser yesterday to begin the process. They have an appointment set for 1/20/15 with Dr. Hollingsworth, but state they are the only parties that are supposed to attend on that date. After the guardians inform the Court that Kaiser stated they would not provide written reports to the Court, the Court then continues the matter with the understanding that it will refer the parties to a Court approved psychologist at the next hearing, and that it will be at the expense of the parties.</p>
Cont. from 111914, 011415			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
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Aff.Pub.			
Sp.Ntc.			
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Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: KT
Reviewed on: 1/15/15
Updates:
Recommendation:
File 24 – Kugelman